

Exporting and Importing Data

Upload as a Google spreadsheet

You can save your data as a Google spreadsheet by tapping the share button in the bottom right corner of the home screen and then tapping “Upload as spreadsheet.” Sign in with your gmail username and password and then tap “Grant access.” Confer will create and upload an individual spreadsheet for each of your subjects. Once it's done uploading, go to your Google documents page to access the spreadsheets.

Sharing data between devices

NOTE: When you share your data via email, the file can only be opened on an iOS device with Confer. It cannot be opened on a desktop or laptop.)

To share data between multiple devices simply tap the share button on the bottom right of the home screen, select “email as attachment” and then email the attached file to your colleague. Your colleague then opens the email on her device, taps the attachment icon, and then selects “Open in Confer.” This will automatically open up Confer and import the attached data, which contains all of the subjects on the sending device. If the subject titles being imported are different from the ones currently on the device, then they will simply be added as entirely new subjects; nothing will be overwritten. If any of the subject titles are the same, the user will be prompted to either merge the existing subject with the new one, or just add the new one as a duplicate and leave the current one alone. Selecting the merge option means that Confer will only import new notes or more recent changes (in flag or level, for example) from the importing subject. No existing notes on the current subject will be overwritten.

This is also an effective way to back up your own data. Emailing the attachment to yourself enables you to import your own data from your email if your device is ever lost, damaged or replaced.

(Confer Lite does not support importing via email.)

Creating printable word documents

There are three different options for creating a printable word document in Confer. You can create a document of the current view of a subject, the notes of an individual student, or the notes of all the students in a subject.

To create a document of the current view of a subject, select the subject on the home screen and then use the tabs to select a certain view. Then, tap the “Share” button in the top right corner and then tap “Email subject view.” This brings up the mail composer and attaches a rich text file (.rtf) of the data on the screen.

To create a document of the notes of an individual student, select the subject on the home screen and then select the particular student. Then, tap the “Share” button in the top right corner and then tap “Email notes.” This brings up the mail composer and attaches a rich text file (.rtf) of that student's notes, ordered by date.

To create a document containing the notes of all the students in a subject, select the subject on the home screen and then tap the gear icon next to the subject title at the top of the screen. Then, tap the “Share” button in bottom top right corner and then tap “All student notes.” This brings up the mail composer and attaches a rich text file (.rtf) containing each student’s notes, ordered alphabetically by student name.

Importing rosters and note text

Confer allows you to pre-type your student names or your teaching points, next steps, etc. on your computer and then import them onto your device via email or Dropbox. Note that when you import the file it will simply merge the new data; it will not overwrite or delete any existing student names or note text.

To import a list of student names or notes into Confer, first create a list of names or note text on your computer using a word processor such as Microsoft Word or Apple Pages. The list must be one name or sentence per line, with a carriage return after each one. When your list is complete, save the file as a plain text file (.txt). (In Apple Pages, click “File,” then “Export...,” then “Plain Text,” then “Next.” Name the file, and then click “Export.” In Microsoft Word, click “Save As,” then in the “Save as type” dropdown list select “Plain Text (.txt).” Click “Save,” then for text encoding select “Unicode (UTF-8),” then click “OK.”) Now, send the file to yourself as an email attachment or save it in your Dropbox account.

To import the file, open it on your device and select “Open in Confer.” You will be prompted to either “Import as roster” or “Import as Quick Text.” If you are importing student names, select “Import as roster” and then choose the subjects you wish to import the names into. Tap “Done” and the import will be completed. If you are importing teaching points, next steps, etc., select “Import as Quick Text,” then select the subjects you wish to receive the import, then tap “Done.” Finally, set the “On” switch for each field you wish to import the text into and then tap “Import” to complete the process. The imported note text will now be available under the “Quick Text” blue arrow for each field you selected, when taking notes in each of those subjects.

Sharing rosters and note text

Confer allows you to export your student names or your teaching points, next steps, etc. as a plain text file in an email attachment. This allows you to share student names or teaching points with other colleagues, who can then open them on their computer or import them into their devices.

To email your roster or your note text as a plain text file, tap the subject on the home screen and then tap the gear icon next to the subject title at the top of the screen. Tap the “Share” button on the bottom right and then select “Roster” or “Quick Text,” depending on what you want to export. (If you select “Quick Text,” you will be prompted to choose which field you want to export. You can only export one field at a time.) Once you’ve made your selection, this brings up the mail composer with the roster or

note text attached as a plain text file. Once emailed, this file can be viewed on a computer, or imported directly back into Confer.

Dropbox Support

Export to Dropbox via Mail

First, download the Dropbox app onto your device. Then, on the Confer home screen tap the upload button, select “Email as attachment” and send the email to yourself. Use either the Mail app or Safari to open the email. Tap the attachment, tap “Open in...” and then select “Dropbox.” This will open Dropbox and allow you to upload the file into your Dropbox account.

Import from Dropbox

First, make sure Confer is completely closed and not running in the background. To do this, double click the Home button on your device and then scroll through the revealed row of apps until you find the Confer icon. Tap and hold it until it wiggles and then tap the red delete icon to close Confer. Then press the Home button to finish. Now, with your data already uploaded into Dropbox via email, open Dropbox, locate the file and select it. Dropbox will show you a screen that says “Unable to view file.” Tap the arrow-leaving-a-box button in the lower right corner. This will display a pop-up of apps that can open the file. Select “Confer” and Confer will automatically open and import the data.

Flags

Flagging students

Flags are a quick and simple way of marking students for different reasons. On the subject screen, simply tap the flag icon next to a student's name repeatedly to move through the five different flag settings; red, yellow, green, gray, and no flag.

You might, for example, quickly scan your students--or their work--looking for evidence of certain skills. As you notice these skills, or the lack thereof, you would scroll through your class and quickly flag those students accordingly. Then, you can tap the “Flags” tab at the bottom of the screen to view students according to their flags and effectively differentiate your instruction.

To clear all the flags, tap the gear icon next to the subject title at the top of the screen and then tap the “Clear Flags” button on the lower toolbar.

You can also flag a student on their individual screen by tapping the flag icon next to their name at the top of the screen.

Groups

Adding and disbanding groups

Select a subject on the home screen and then tap the “Group” tab to view your students in their small groups.

To add a new group, scroll to the top and tap the “Add new group” button. Enter a unique group name and hit the blue “Done” button in the upper right. Now, select the students you want to add to that group by tapping each student’s name. You can unselect them by tapping them again to remove the checkmark. Once you have all the students selected, tap the blue “Form Group” button in the top right. Your group will be created and ordered alphabetically among the other groups.

To disband a group, tap the red “delete” icon next to the group’s name. Tap the red “Disband” button that appears and that group name will be removed and all of the students in that group will be sent to the “No Group” category at the bottom of the list.

Moving students between groups

Select a subject on the home screen and then tap the “Group” tab to view your students in their small groups.

To move a student between groups (or in and out of the “No Group” category) tap and hold the three bars icon to the far right of that student’s name. Then, simply drag that student into the group where they belong and release them.

Notes

Adding, deleting and editing notes

Select a subject on the home screen, then select a student.

To add a note to that student, scroll to the top and tap the “Add new note” button. Each note has four fields: Tag, Strength, Teaching Point and Next Step. No field is required; any of them can simply be left blank. Tap the field to begin entering text, and tap the “Done” button on the keyboard when finished. After tapping “Done” another empty text field will appear beneath your text, allowing you to enter several individual notes within each field. So for example, your note may have one teaching point and three next steps. This is important because you can view and group your students according to each of those individual next steps. When you’ve finished your note, tap the blue “Save” button in the top right. Your note will be saved at the top of that student’s list, beneath the “General Notes” field, with the date it was created as a heading.

To edit an existing note, simply tap that note and edit it accordingly. When you save, it will retain the date it was created. It will not be saved to the top of the list like a note that was created today.

To delete a note, swipe your finger across that note and then tap the delete button that appears. You cannot delete a note if it is the only note that student has.

Applying one note to several students

After meeting with a group of students you will often want to take one note and apply it to each of those students. To do this, select the subject from the home screen. Then, tap the empty checkboxes to the far left of each student's name to select the students you need. You can use the tabs to switch between views and still retain the checkmarks you've applied. After selecting the necessary students, tap the blue "Add Note" button that has appeared in the top right. This brings you to the notetaking screen. Enter your notes as normal and when you tap "Save" the note will be saved to each student you selected.

Instantly reusing text from other notes

As you take notes on your class, you may find yourself wanting to reuse the same text for different students without having to retype it each time. You can do this with the blue arrow buttons on the notetaking screen.

Any time you save a note for any student, the text you entered in each field (Tag, Strength, etc.) is saved into a list of reusable text for that field. To reuse any text that you've entered previously, simply tap the blue arrow button next to that field on the notetaking screen. This brings you to an alphabetized list of all the text you've saved in that field in previous notes. Scroll through and tap the text you want to reuse and it will instantly be added to your note.

Viewing students by their notes

One the most powerful features of Confer is the ability to view your students based on the notes they have in common. Finding all of the students that share the same teaching point or next step can take several minutes with a paper system. With Confer, it can be done in seconds.

To view your students by their notes, select a subject and then tap the "Note" tab. This presents a pop-up that lets you decide whether to view them by their tags, strengths, teaching points or next steps. After selecting a field (for example, "Teaching Point") Confer displays an alphabetical list of headings with students under each heading. The headings are the different teaching points you've entered. Under each heading are the students who have a note with that teaching point. Scrolling through lets you instantly identify groups of students with common issues, based on the notes you've taken on them as individuals.

You can control how far back into your students' notes you want to look by scrolling to the top and using the slider. You can limit it to just the most recent note for each student or you can look through text up to five notes back for each student.

Search

Searching for students

Select a subject on the home screen and then tap the “Search” tab to search for students with specific text in their notes.

In the top cell of the Search screen, enter the text you want to search for. The search field is not case sensitive. Then, select which fields you want to search in by toggling the on/off switch for each field. This enables you to distinguish between students with the search text as a strength, versus students with that text as a teaching point or next step.

Finally, use the slider to determine how far back into each student's records you want to search. If you only want to search the most recent note for each student, set it to one. If you want to search through every note each student has, slide it all the way to the right to “All.” Or, of course, choose a number somewhere in between.

Now, tap the blue “Search” button in the top right. Confer will display your students in two groups: the students that matched your search parameters on top, and the students that did not match your search parameters at the bottom.

Students

Adding and deleting students

To add or delete a student tap the subject on the home screen and then tap the gear icon next to the subject's title at the top of the screen. This brings you to the “Edit Subject” screen. To add a student, tap the “add student” button on the bottom toolbar. To delete a student, tap the red circle icon next to a student's name and then tap the red “delete” button that appears.

Editing names and levels

To edit a student's name or level, first go to the “Edit Subject” screen by tapping the subject on the home screen and then tapping the gear icon next to the subject's title at the top of the screen. Tap a student's name and then edit their name and/or level accordingly.

Subjects

Creating a brand new subject

To create a new subject, tap the button with a plus icon on the bottom of the home screen. Enter a unique title and tap “Done.” From the pop-up menu select “Create new roster.” This brings you to the “Edit Subject” screen. Tap the “add student” button on the bottom toolbar to add a new student. Each student has a name and a level field, which is optional. Enter a unique name, and then, if you wish, enter whatever text you'd like for the student's level. Tap “Save” and the student will be added to your subject.

You can edit a student by simply tapping on that student's name and you can delete a student by tapping the red button next the student's name and then tapping the "Delete" button that appears. You can also change the subject's title by tapping on the title. Once your subject is finished, tap "Done" and it will be added to the list of subjects on the home screen.

New subject from an existing roster

To create a new subject that uses an existing roster, begin by adding a new subject. Tap the button with a plus icon on the bottom of the home screen. Enter a unique title and tap "Done." From the pop-up menu select "Use existing roster." This brings up a list of all your current subjects. Tap the subject whose roster you wish to use. This brings you to the "Edit Subject" screen, with all of the students from the subject you selected already in place. You can add, delete and edit these students if you'd like, or leave them as is. When you're finished, tap "Done" and the new subject will be added to the list of subjects on the home screen.

Editing and deleting subjects

To edit a subject, tap the subject on the home screen and then tap the gear icon next to the subject's title at the top of the screen. This brings you to the "Edit Subject" screen where you can edit the subject's title, add and delete students, or edit students' names and levels.

To delete a subject, simply swipe your finger across the subject title on the home screen and then tap the "Delete" button that appears.